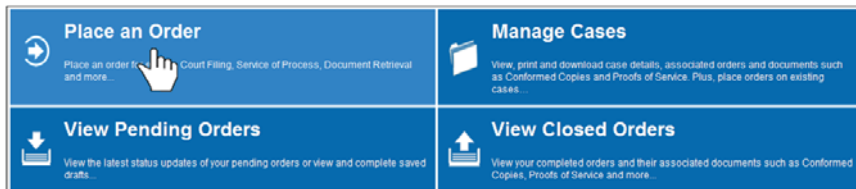


## USERGUIDE

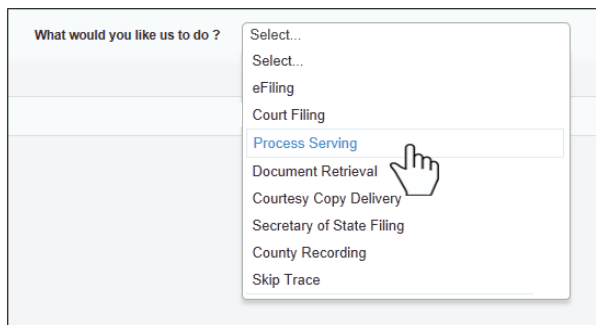
On the provided login page, type in your email, password and click on the "Login" button.

**Please note:** We recommend using any modern browser for the best experience.

- 1 Once you are logged into the customer portal, click on "Place an Order."



- 2 In the "What would you like us to do?" field, select "Process Serving."



- 3 Type the name of the Party to be served, select capacity, and enter registered agent (If known.)

Select the Address Type and provide the address of where you would like the documents served.

The screenshot shows a form with the following fields and options:
 

- 'Select number of Party(s) to Serve: 1' (dropdown) with a note: '(for more than 15 Party(s), please place multiple orders)'
- 'Party(s) To Serve\*' (text input)
- 'Capacity\*' (dropdown menu)
- 'Registered Agent' (text input)
- 'Address Type\*' (dropdown menu)
- 'Address\*' (text input)
- 'City' (text input)
- 'CA' (state dropdown)
- 'Zip' (text input)
- 'Hearing Date/Time:' (text input)
- 'Dept/Div:' (text input)
- 'Advance Witness Fees:' with radio buttons for 'Yes' and 'No' (selected)
- 'Proof:' with checkboxes for 'File' and 'Notarize'
- 'Special Instructions:' with a text area containing the placeholder text: 'Please include any phone numbers and/or descriptions.'

 At the bottom, there are buttons for 'Previous', 'Next', and 'Save As Draft'.


When appropriate you can enter hearing date/time and dept/div.

If you would like us to advance witness fees, select "Yes."

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If you would like to file or notarize the Proof of Service (Affidavit of Service,) checkmark the “**File**” or “**Notarize**” box of the Proof section (additional charges apply.)

Proof:  File  Notarize (Additional fee will apply)



Please indicate in “special instruction” any information that will help us with getting the party served.

Click on “**Next.**”

- 4 Enter in the Case Number, select the Jurisdiction of where the documents were filed and select the Attorney of Record.

In the event that you do not have a case number, check the box “Check here if you do not have a Case Number”, then select or add attorney of record.

Click on “**Next.**”

Case Number:

Jurisdiction:

Case Title:

Proof of Service Information

Attorney of Record:  Firm Name: Joe Test 23 Account  
 Address: 312 W. 2nd Street, Suite 1006  
 City/State/Zip: Los Angeles CA 90012  
 Phone: (800) 366-5445

Check here to override name on Proof of Service


Case Number:

Check here if you do not have a Case Number.

Proof of Service Information

Attorney of Record:  Firm Name: Joe Test 23 Account  
 Address: 312 W. 2nd Street, Suite 1006  
 City/State/Zip: Los Angeles CA 90012  
 Phone: (800) 366-5445

Check here to override name on Proof of Service

 If you would like a different name to appear on header of proof then select “Check here to override name on Proof of Service.”

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Click on **“Next.”**

Next, you’ll need to enter the case participants such as the Plaintiff and Defendant in the case. You will only need to add the lead party(s).

Click on the **“Add Party(s)”** button.

If you select **“Yes,”** based on how your account was set up, a **“Billing Code”** may be required to proceed. The **“Billing Code”** is your firm’s internal, billing, or client matter number code on a particular case.

Click on **“Next.”**

**5** On the Documents Tab, there are 3 options to submit documentation necessary to complete your Process Serve order:

- **Upload** – upload document(s) directly from your computer.
- **Fax** – provide a list of document(s) to be faxed separately.
- **Existing Documents** – select previously uploaded document(s) from an existing case.

To upload documents, enter the title of the document you wish to upload in the Document Title field and click the ‘Attach File...’ button to upload your document(s).

**Note:** as you type in the Document Title field, the application will dynamically display titles that match your input. You may pick from the list provided or type your Document Title free form.

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This screenshot shows the 'Upload' step of the document selection process. At the top, there are three radio buttons: 'Upload' (selected), 'Fax', and 'Existing Documents'. Below this, there are three options for 'Type the Document Title using': 'Starts with', 'Contains' (selected), and 'Court defined Document Titles'. A text input field labeled 'Document Title:' contains the placeholder text 'Enter free-form title or choose from the list below, then click Attach File.'. At the bottom, there are 'Previous' and 'Next' buttons on the left, and a 'Save As Draft' button on the right.

Each document is recommended to be uploaded individually. Please repeat the process as many times as you need until all your documents are uploaded, e.g., Summons, Complaint, Civil Case Cover Sheet, Proof of Service, etc.

Or select the “**Fax**” option and enter the title of the document you wish to fax in the Document Title field. Please estimate total pages of all documents.

This screenshot shows the 'Fax' step of the document selection process. At the top, there are two radio buttons: 'Fax' (selected) and 'Existing Documents'. Below this, there are three options for 'Type the Document Title using': 'Starts with', 'Contains' (selected), and 'Court defined Document Titles'. A text input field labeled 'Document Title:' contains the placeholder text 'Enter free-form title or start typing to choose from a list, then click Accept.'. To the right of this field is an 'Accept' button. Below the input field is a dropdown menu labeled 'Title' with the selected option 'Summons and Complaint'. Below the dropdown is a text input field for 'Total Pages of All Documents:' with radio buttons for 'Under 200' (selected) and 'Over 200'. A note next to it says '\*Estimate. Actual pages counted when faxed.'. At the bottom, there are 'Previous' and 'Next' buttons on the left, and a 'Save As Draft' button on the right.

Or select “Existing Documents” and you can select document(s) you have already uploaded on case. You have the option to view and the select which document(s) you would like to use for this order.

Order #	Title	Date Uploaded	Action	Select
1108525	Summons and Complaint	Oct 16, 2015	<a href="#">View</a>	<input type="checkbox"/>
1108525	1108525-ConformedCopy.pdf	Oct 16, 2015	<a href="#">View</a>	<input type="checkbox"/>
1008766-01	Civil Subpoena	Aug 03, 2014	<a href="#">View</a>	<input type="checkbox"/>

Below the table, there is a 'Show 20 entries' dropdown, 'Showing 1 to 3 of 3 entries', and navigation buttons: 'First', 'Previous', '1', 'Next', 'Last'. At the bottom right are 'Select' and 'Cancel' buttons.

This screenshot shows a dropdown menu for selecting documents. The 'Title' dropdown is open, showing three options: 'Summons (1 page)', 'Complaint (2 pages)', and 'Civil Case Cover Sheet (1 page)'. Each option has a red 'X' icon to its right. Below the dropdown are 'Previous' and 'Next' buttons, with a hand cursor pointing to the 'Next' button. To the right is a 'Save As Draft' button.

Click “**Next**.”

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6 Verify that the address to be attempted is correct.

Click on **“Next.”**

The screenshot shows a web form titled "Robert Monroe - Individual". It contains several sections:

- Service Level\*:** A dropdown menu with "Next Day" selected.
- Address Type\*:** A dropdown menu with "Residence" selected.
- Address\*:** A text field containing "123 Any St. Anywhere, CA, 91766".
- 5 Day:** A dropdown menu with "Select..." selected.
- Address:** A text field.
- City:** A text field.
- CA:** A dropdown menu.
- Zip:** A text field.
- Hearing Date/Time:** A text field.
- Dept/Div:** A text field.
- Advance Witness Fees:** Radio buttons for "Yes" and "No", with "No" selected.
- Proof:** Checkboxes for "File" and "Notarize".
- Special Instructions:** A text area with the placeholder text "Please include any phone numbers and/or descriptions."
- Navigation:** Buttons for "« Previous", "Next" (with a mouse cursor over it), and "Save As Draft".

7 Select the best option as to when you would like the document(s) attempted for service. Select each name you would like to notify of status updates.

The screenshot shows a web form titled "When would you like this attempted?". It contains several sections:

- Service Options:** Three radio buttons for "Attempt Tomorrow by 5:00 PM (Serve Same Day) \*", "Attempt Thursday by 5:00 PM (Serve Next Day) \*", and "Attempt Wednesday, February 24 by 5:00 PM (Serve 5 Day) \*".
- Disclaimer:** A note stating "The Service times displayed are only an estimate based on the information provided. If you need your order processed sooner than the times listed above, please call us at (800)366-5445."
- Notifications:** A section titled "Notifications: Check box of person(s) you would like to notify of status updates." containing a list of names with checkboxes: Jonathan Hill (checked), Barney Stinson, Bill Davidheiser, Daniel Flores, alcarlo castanar, Bhumika Garg, Dan Kushner, and David Saldana.
- Navigation:** Buttons for "« Previous", "Submit", and "Save As Draft".

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- 8 If you are sending the documents via FAX or Mail, click on “**Print Routing Pages.**” Include the routing page, to use as the cover page, along with your documents. The FAX number will be located on the top of the page.

If mailing, contact our Customer Support who will provide you with the address of where you will need to mail your documents.


**Thank you for your order(s)**

Your order number(s): **1042757**

You can print the Order Confirmation and/or Routing Pages by clicking the appropriate Print button.

If you would like further assistance, please contact our Customer Support

[Print Confirmation\(s\)](#)   [Back to Manage Cases](#)



« Previous   Submit   Save As Draft

Service of Process

Serve Entity:  
Robert Monroe - Individual  
123 Any St. Anywhere, CA 91766

Serve Info:  
123 Any St. Anywhere, CA 91766

Case Info:  
Case Number: CVS1231231 -  
Jurisdiction: Central - Stanley Mosk Courthouse  
Attorney Of Record: Michael Good

Case Participants:  
Monroe, Robert, Defendant  
Ward, Jim, Plaintiff (Client)

Document(s):  
Summons (1 page)  
Complaint (3 pages)  
Civil Case Cover Sheet (1 page)

Order Details:  
Notify:  
Jonathan Hill